DIRECT CERTIFICATION/
DIRECT VERIFICATION

3E's of Healthy Living —
Education, Exercise and Eating Right

CE IMPORT
FOR CE LEVEL MATCHES

OVERVIEW

Direct Certification is a simplified method of determining student's eligibility for free meals through the National School Lunch and School Breakfast Programs or free milk under the Special Milk Program without completing a Household Eligibility Application. In addition, students directly certified to receive free meals or milk are not subject to verification.

BENEFITS OF THE DIRECT CERTIFICATION PROCESS:



SAVES EMPLOYEE'S TIME AND REDUCES PAPERWORK!!

Any student who has been directly certified does not have to fill out a paper application and does not have to go through the verification process



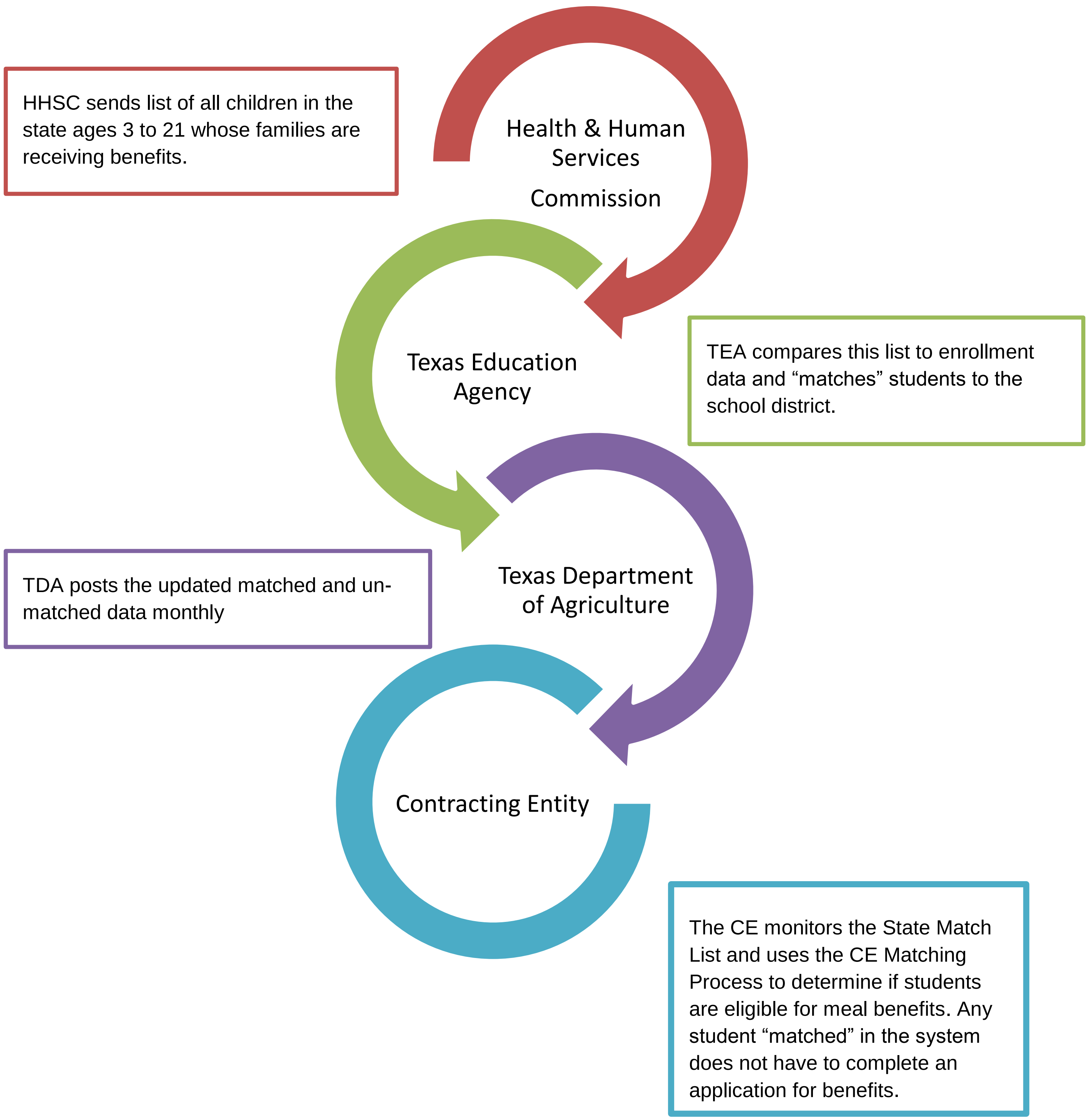
.



IDENTIFIES ELIGIBLE STUDENTS QUICKLY!

This process may identify eligible students whose household did not complete the paper application.




HHSC sends list of all children in the state ages 3 to 21 whose families are receiving benefits.
Health & Human Services Commission
Texas Education Agency
TEA compares this list to enrollment data and “matches” students to the school district.
TDA posts the updated matched and un-matched data monthly
Texas Department of Agriculture
Contracting Entity
The CE monitors the State Match List and uses the CE Matching Process to determine if students are eligible for meal benefits. Any student “matched” in the system does not have to complete an application for benefits.

1. CE prepares file with student data for upload
2. CE logs into TX-UNPS and selects Direct Certification/Direct Verification screen
3. CE selects CE Match process
4. CE uploads data file
5. System returns file of eligibility records matched to CE's data file
6. CE saves matched file and prints copy for records
7. CE notes in records (POS system) students that are directly certified for benefits -- noting category of eligibility

Helpful Tips **IF YOU HAVE CHANGED YOUR TX-UNPS PASSWORD TODAY YOU CANNOT ACCESS THE SYSTEM UNTIL TOMORROW.**

Helpful Tips After an extended period of inactivity the system will "kick you out" and may display an unauthorized use message. If you get this message click on "EXIT" in the top right corner and log back on.

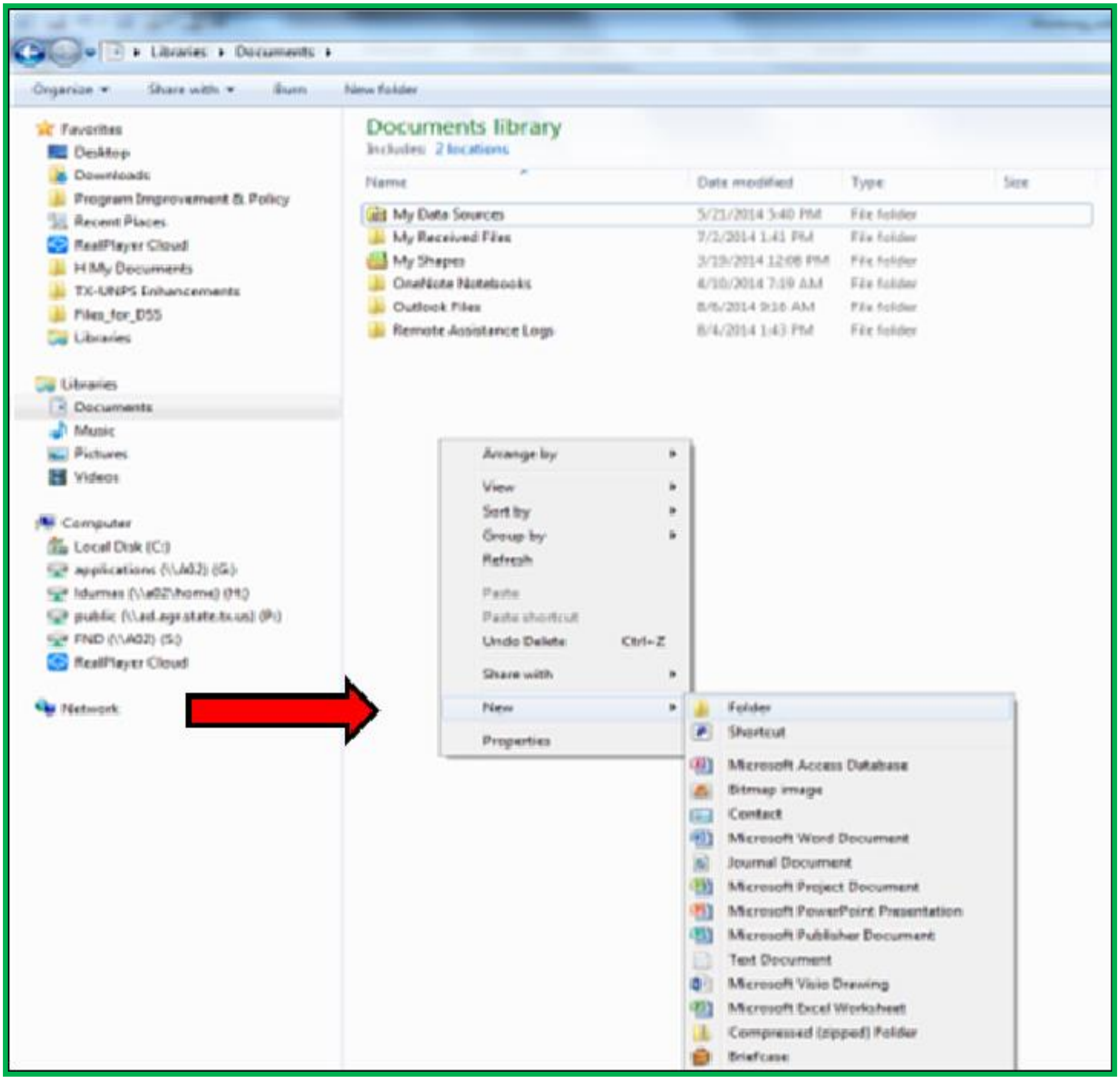
Helpful Tips **PLEASE NOTE:** the screen shots in this guide were taken while using the Internet Explorer 9 browser. Your screens may or may not look exactly as the ones in this guide if you are using a different browser (i.e. Mozilla Foxfire, Google Chrome, Safari, etc.).

CONTENTS

MAKE FILE FOLDERS

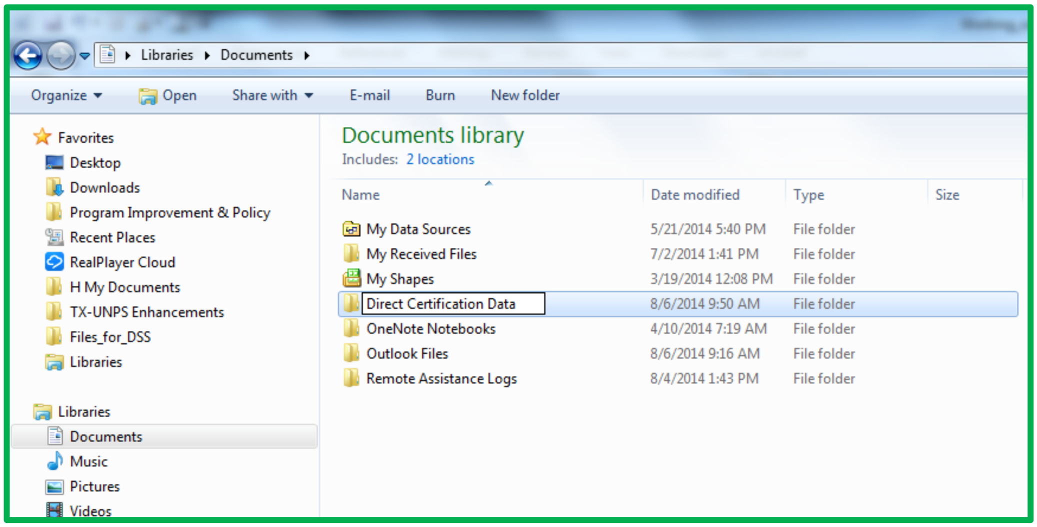
It is easier if you determine where you want to store the Direct Certification files before you start the process. The most efficient method will be to create a Direct Certification folder and inside of that folder create a folder for the school year.

1. In the **MY DOCUMENTS** window, right click and choose **NEW > FOLDER**.

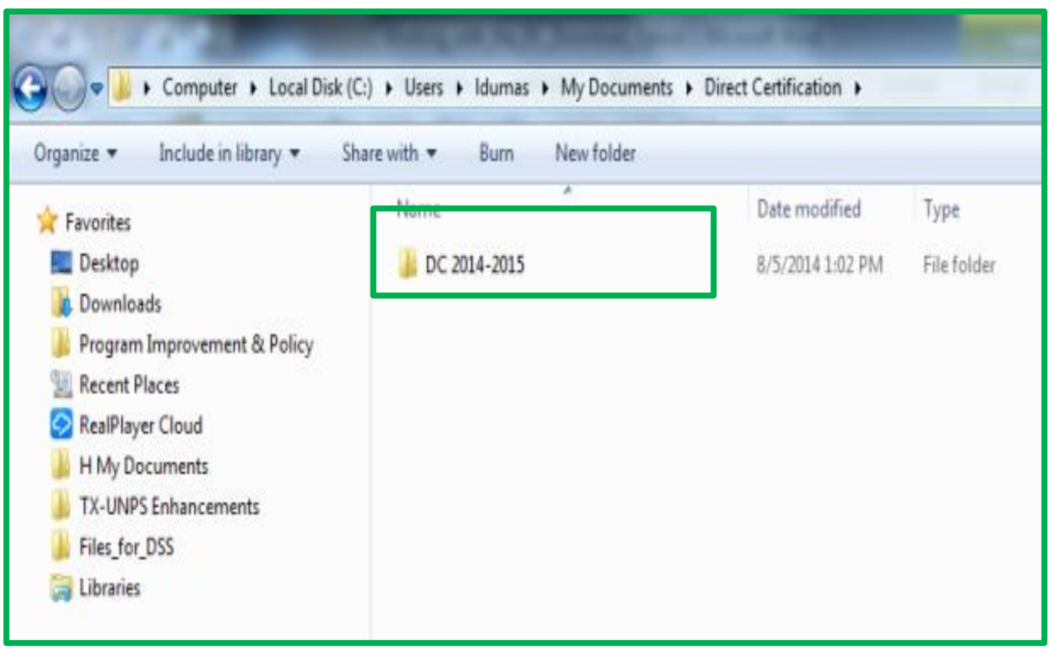


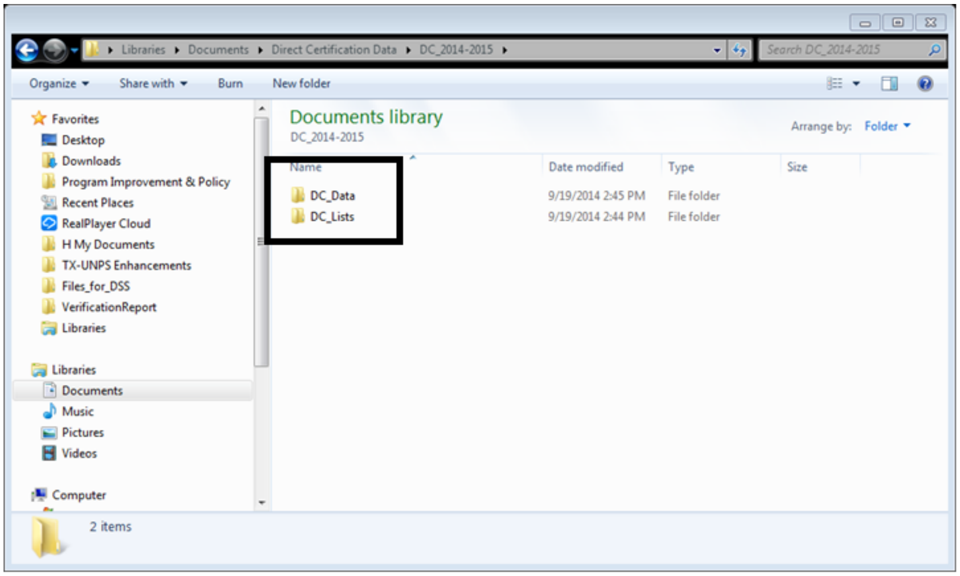
2. Name the folder **DIRECT_CERTIFICATION_DATA**.

Helpful Tips Files are more easily corrupted if there are spaces in the file name. Use the underscore (_), hypen (-) or capital letters to take place of spaces between words.)



3. Inside of that folder, right click to make another New Folder. Name it **DC-** followed by the current school year.
4. Inside of this folder, make 2 more – one for DC_Lists and another for DC_Data.



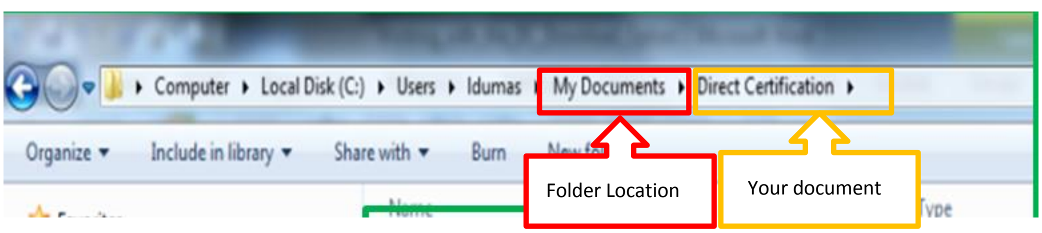




Note: You will need to make the Direct Certification Data folder just once. Make a new DC-(school year) folder each August to start the new school year.



Make a note of where on your computer you saved the folder so that it is easy to find when you need to access it later in the process.



PREPARE CSV FILE FOR UPLOAD

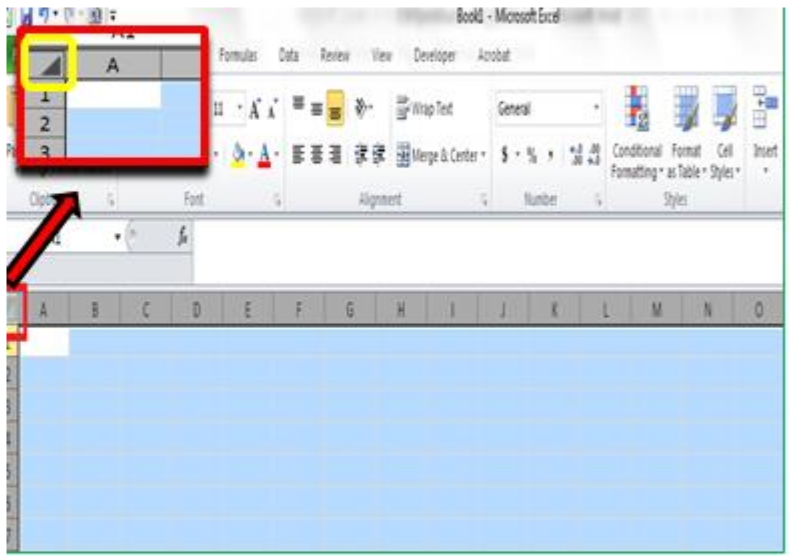
The data must be a comma delimited file (CSV). A CSV file can be made in any version of Excel.

- Your POS system may have an option for generating a file with the necessary data
- If you have access to PEIMS data (public and charter schools), contact the PEIMS clerk for your district/school and have them pull the information from PEIMS as a .csv file (or Excel file if they cannot do a .csv file type. The file must be formatted as described in Step 2.

1. Create a new file in Excel.

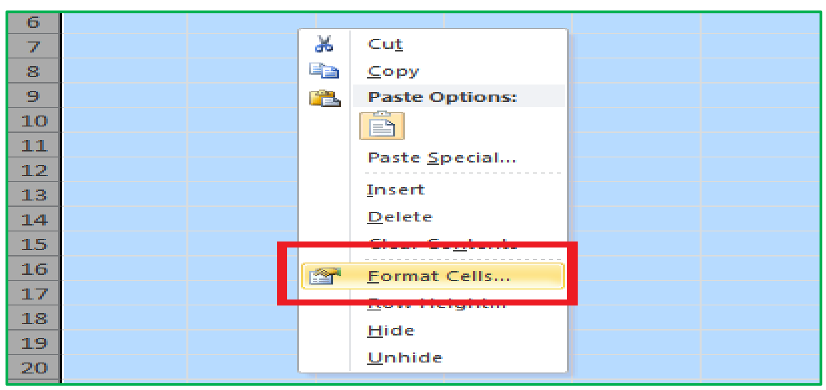
2. Format cells as "Text".

   Click the box in the upper left corner to select the entire worksheet.

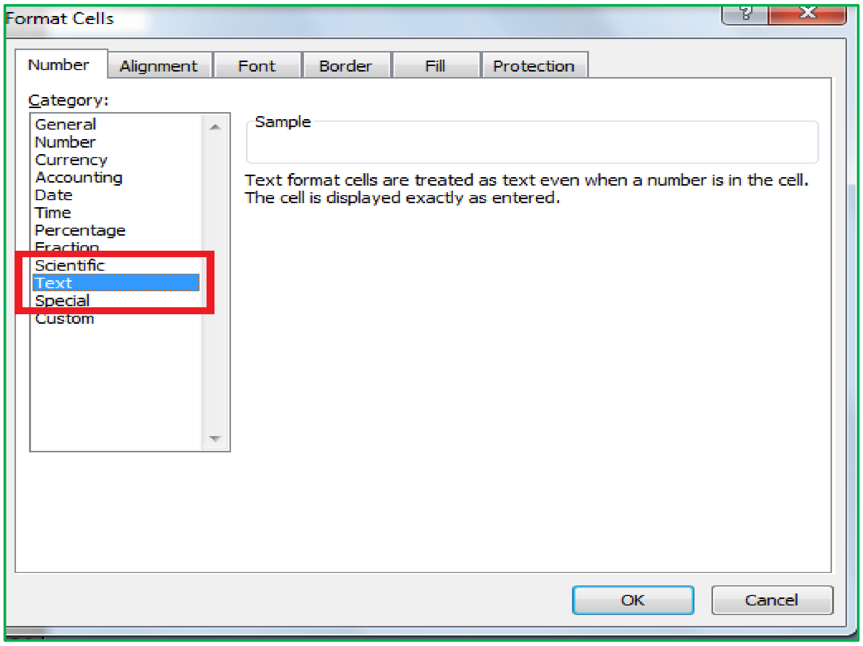


   Right -- click and select "Format Cells".





Select "Text" and then select OK.



3. Set up the file with these columns in the same order and format.
   Do not include header labels for the columns.

   Column A: Social Security Number

   9 digits (numbers); no dashes

   Include leading zeros

   Column B: Last Name

   Column C: First Name

   Column D: Birth Date

   mm/dd/yyyy

   Must be digits(numbers) – not letters

   Must include leading zeros in month and day

   Column E: Gender (F, M)

   6th Column – *If you can pull eco eligibility information from PEIMS, it will be in this column. It will show the students that are already directly certified. Delete all previously identified students off this list before proceeding.*

   If this information cannot be pulled from PEIMS, skip this column. This column will be deleted before uploading the file.

   Column F: CE ID

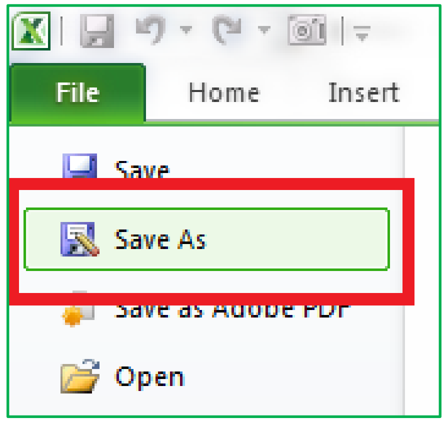
   5 digits (numbers)

   Include leading zeros

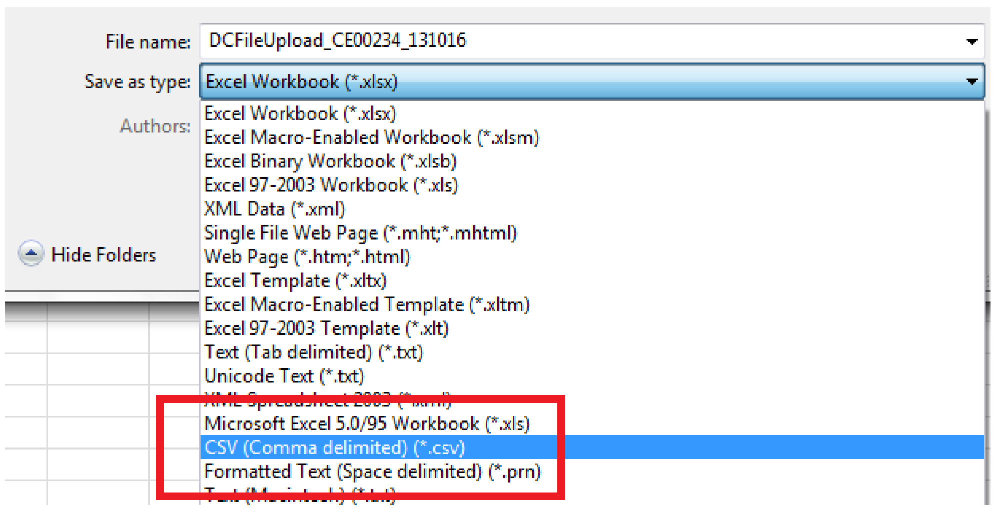
	A	B	C	D	E	F
1	777889999	Doe	John	10/11/2013	M	00234
2	999887777	Doe	Jane	11/10/2013	F	00234
3						
4						

4. When completed, save as and select “CSV (Comma delimited) (*.csv)” from the file type drop-down box.

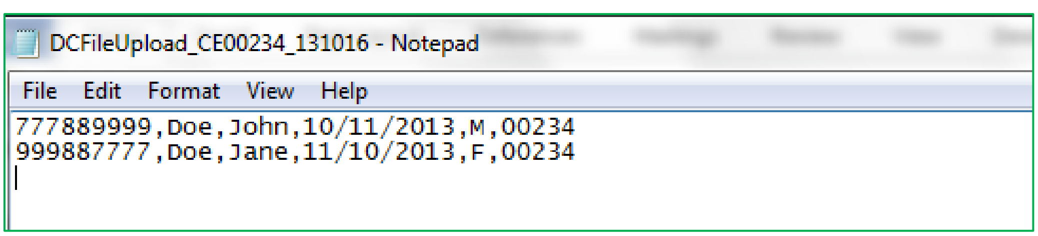
Select File> Save as



Use the drop-down for “Save as Type” and select “ Comma Separated Values”



Check the CSV file in a text editor such as Notepad or WordPad instead of Excel. This will show leading zeros. Your example should look like this:

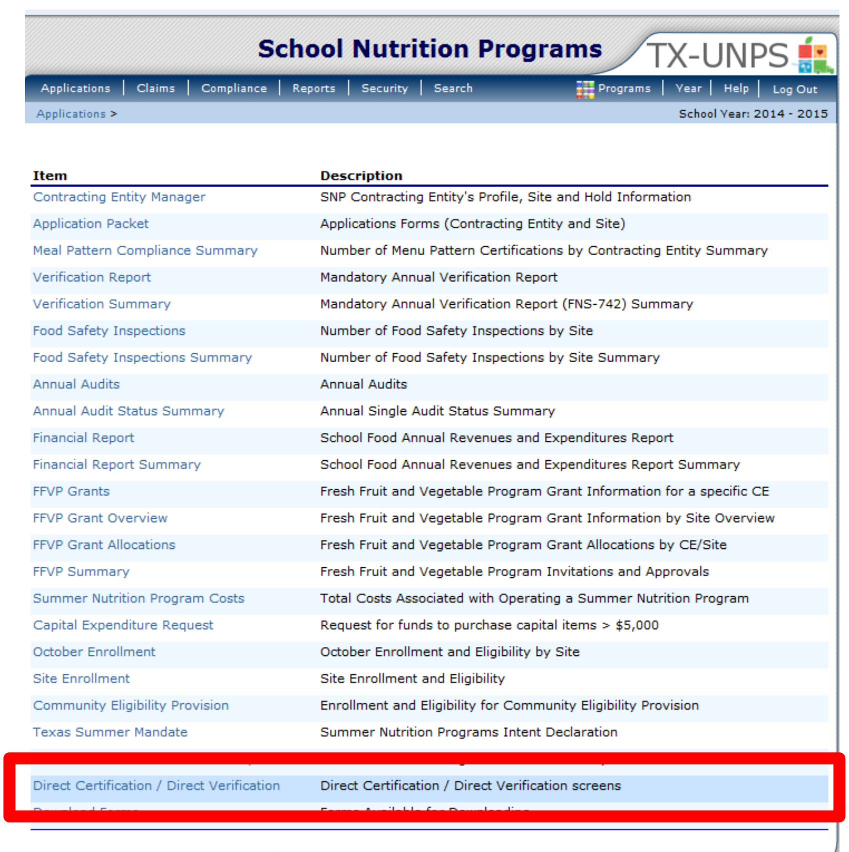


CE IMPORT FOR CE LEVEL MATCHES

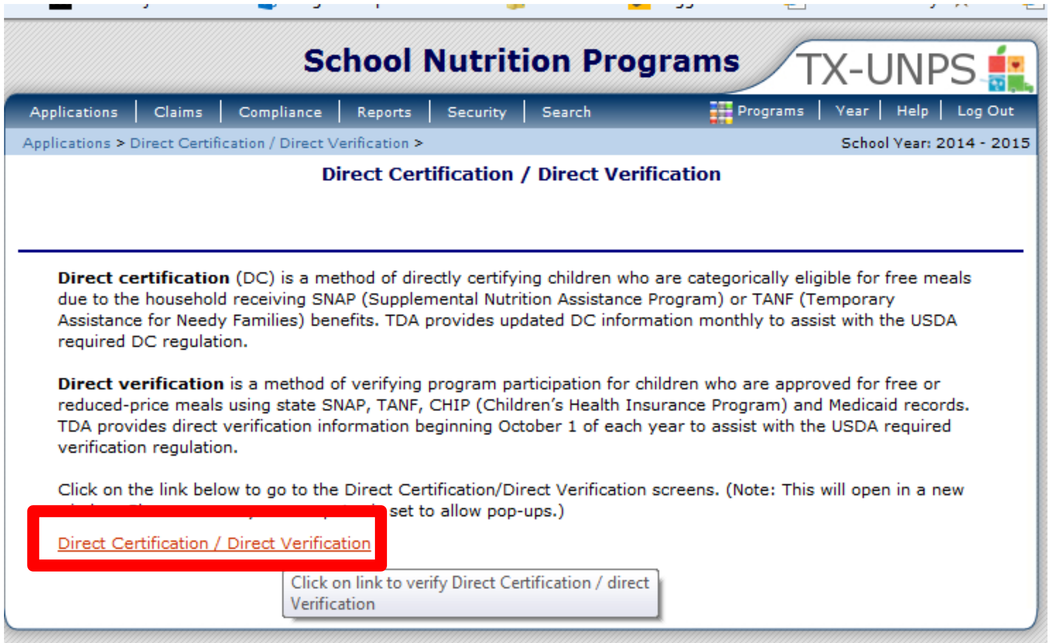
Log-in to TX-UNPS.

Go to School Nutrition Programs > Applications > Direct Certification/Direct Verification





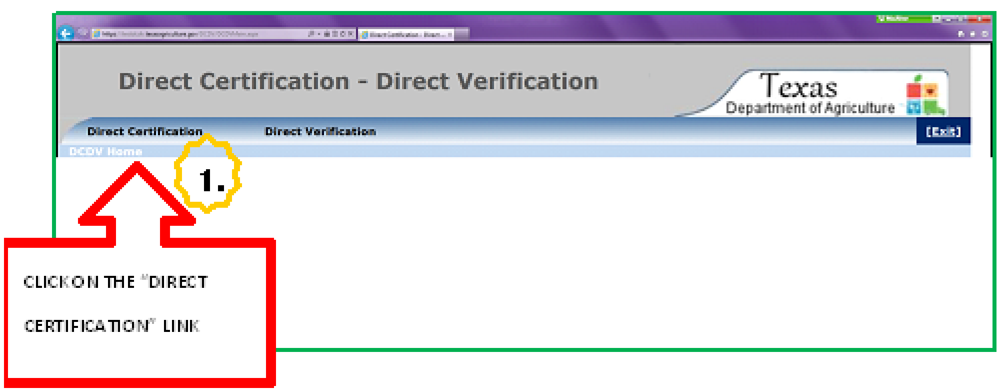
Click on Direct Certification/Direct Verification (again)



Helpful Tips You will get this message if you have changed your password today or have timed out (been inactive for a period of time). If you have not changed your password, log-out and log back in and go immediately to Direct Certification/Direct Verification.

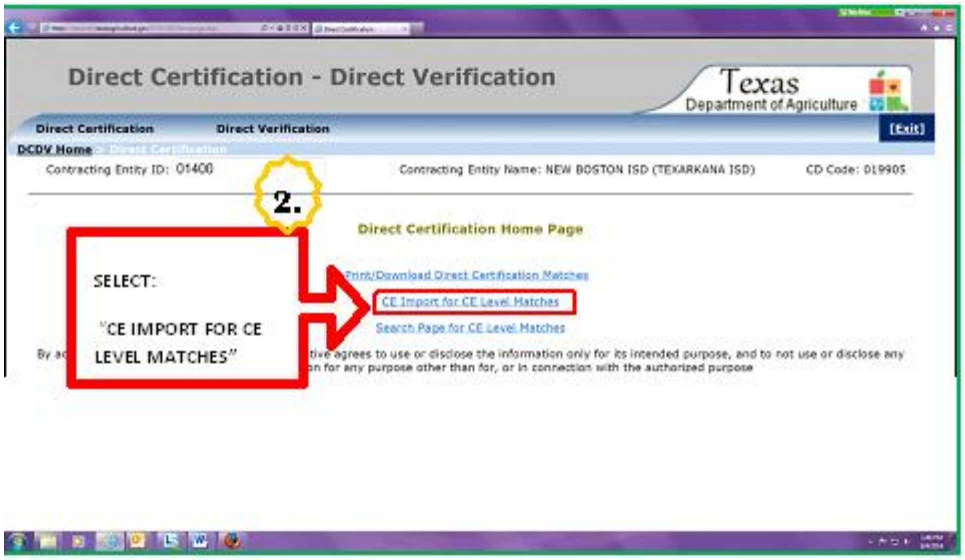
> "**Unauthorized misuse of TDA information resources is prohibited and misuse is subject to criminal prosecution. Except as otherwise provided by applicable privacy laws, there should be no expectation of privacy. Usage may be subject to security testing and monitoring."**

Click on the "Direct Certification" link (left of screen on blue bar).

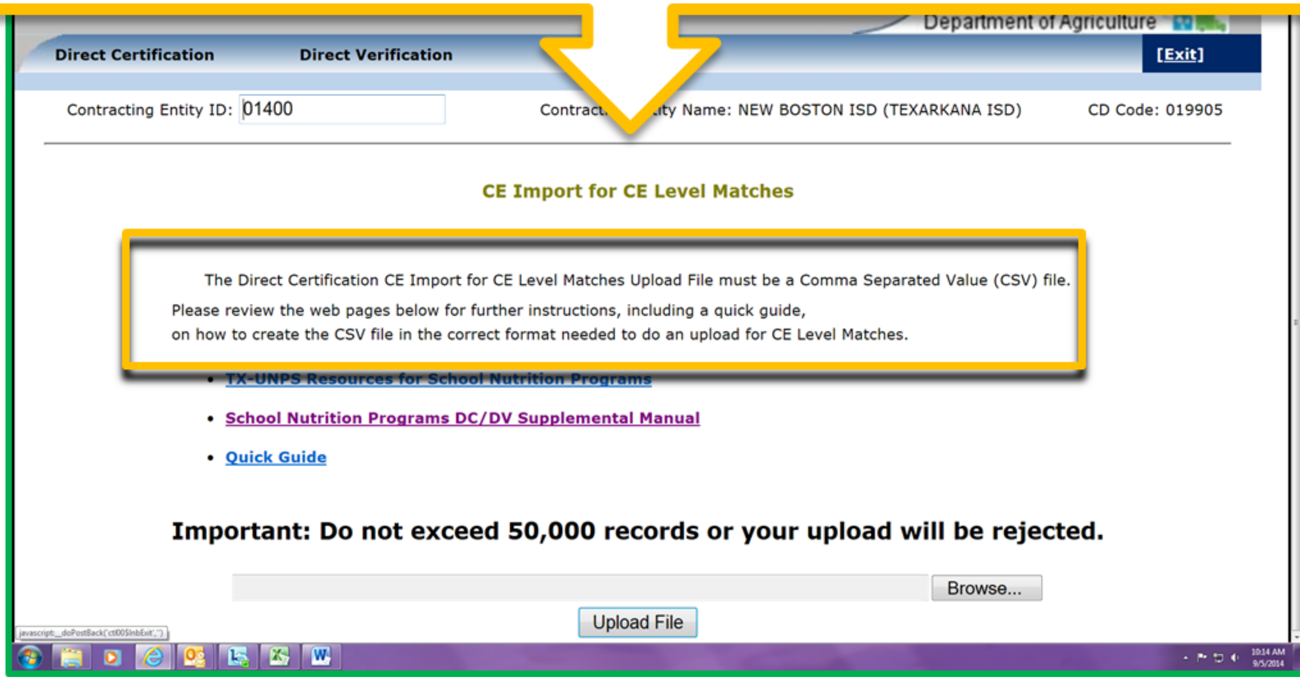


Helpful Tips Some users will have to enter a CE ID if they are associated with more than one district.

Select “CE Import for CE Level Matches”



The Direct Certification CE Import for CE Level Matches Upload File must be a **Comma Separated Value (CSV) file**.
Please review the web pages below for further instructions, including a quick guide,
on how to create the CSV file in the correct format needed to do an upload for CE Level Matches.

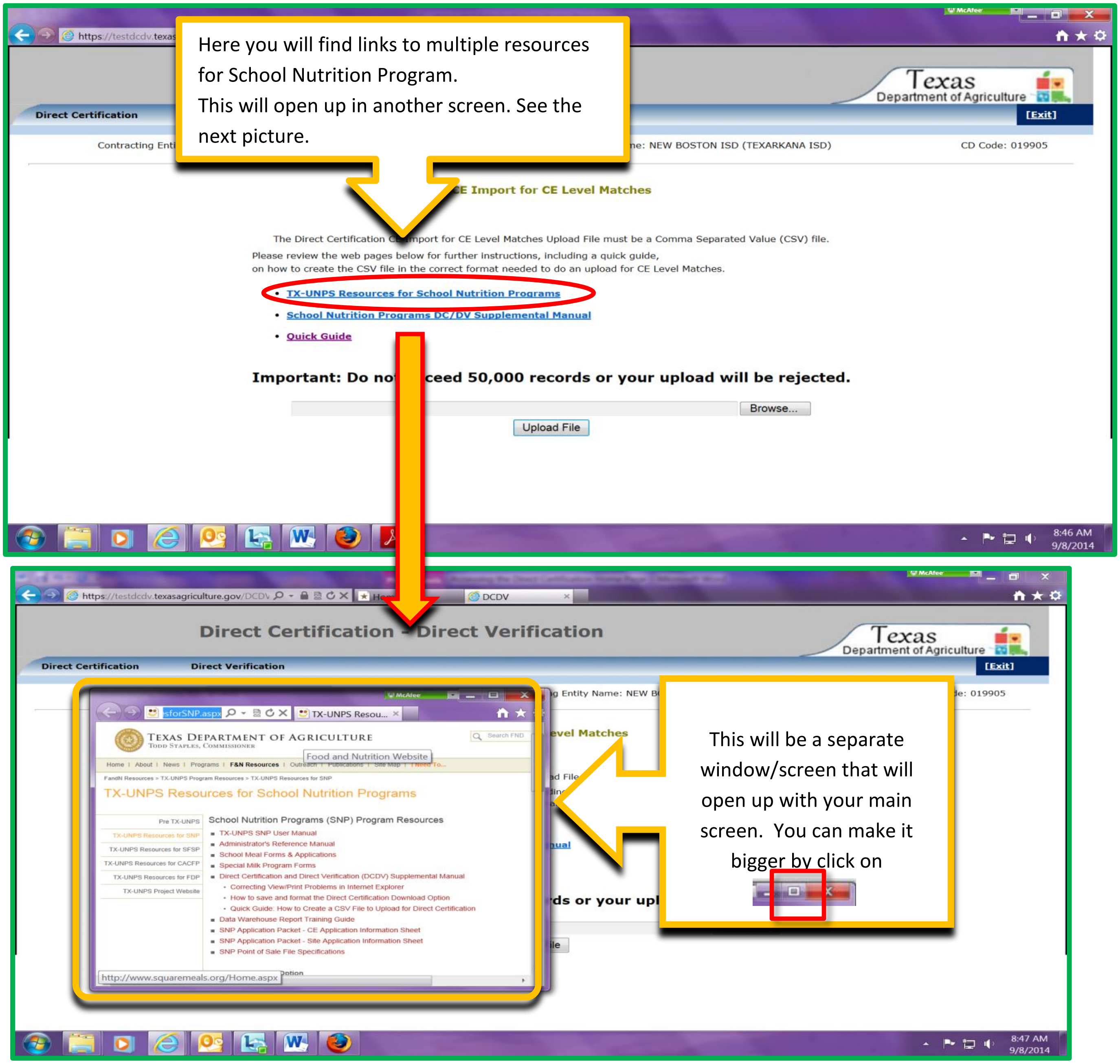


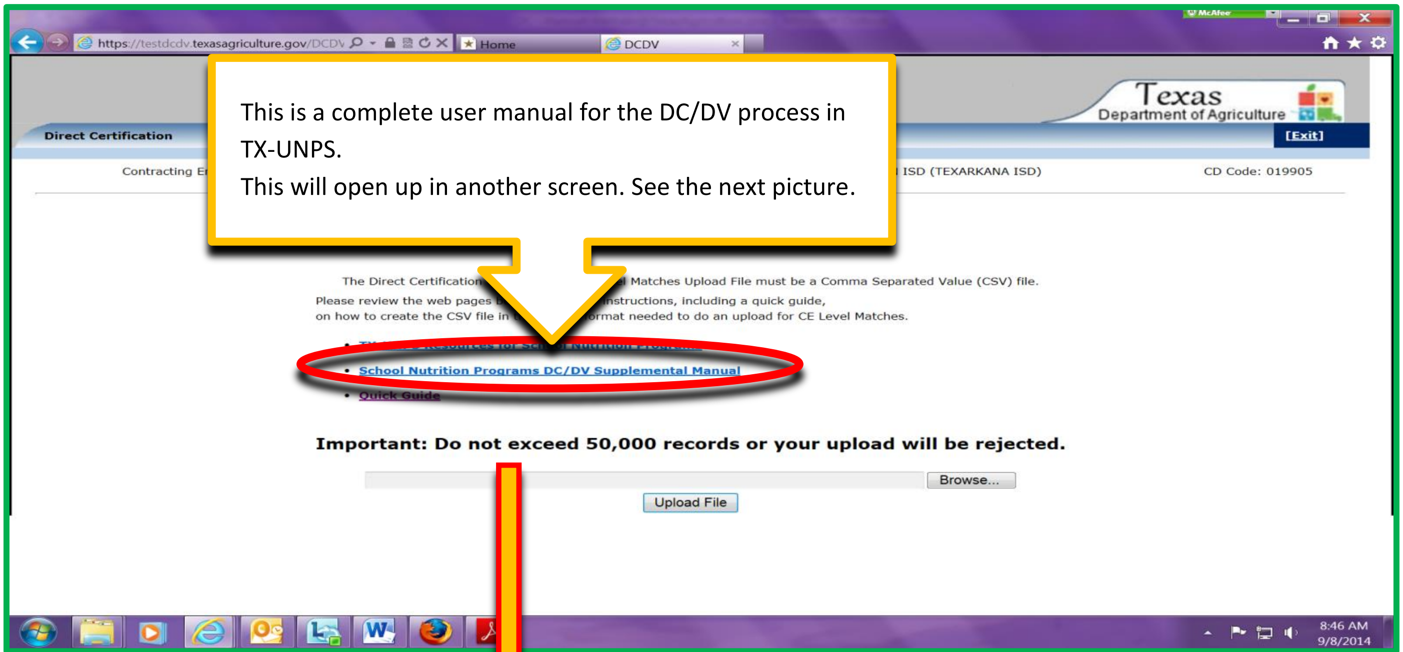
RESOURCES FOR YOUR REFERENCE

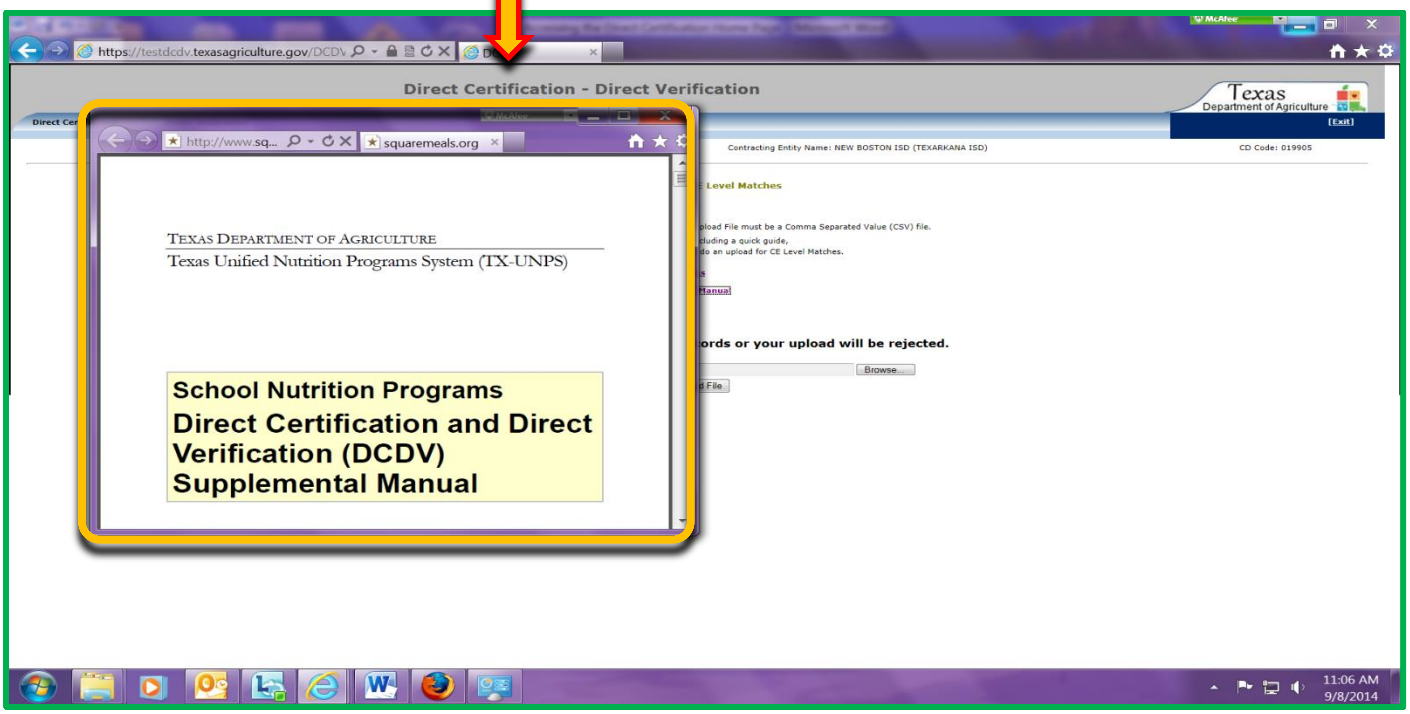
TX-UNPS RESOURCES FOR SCHOOL NUTRITION PROGRAMS

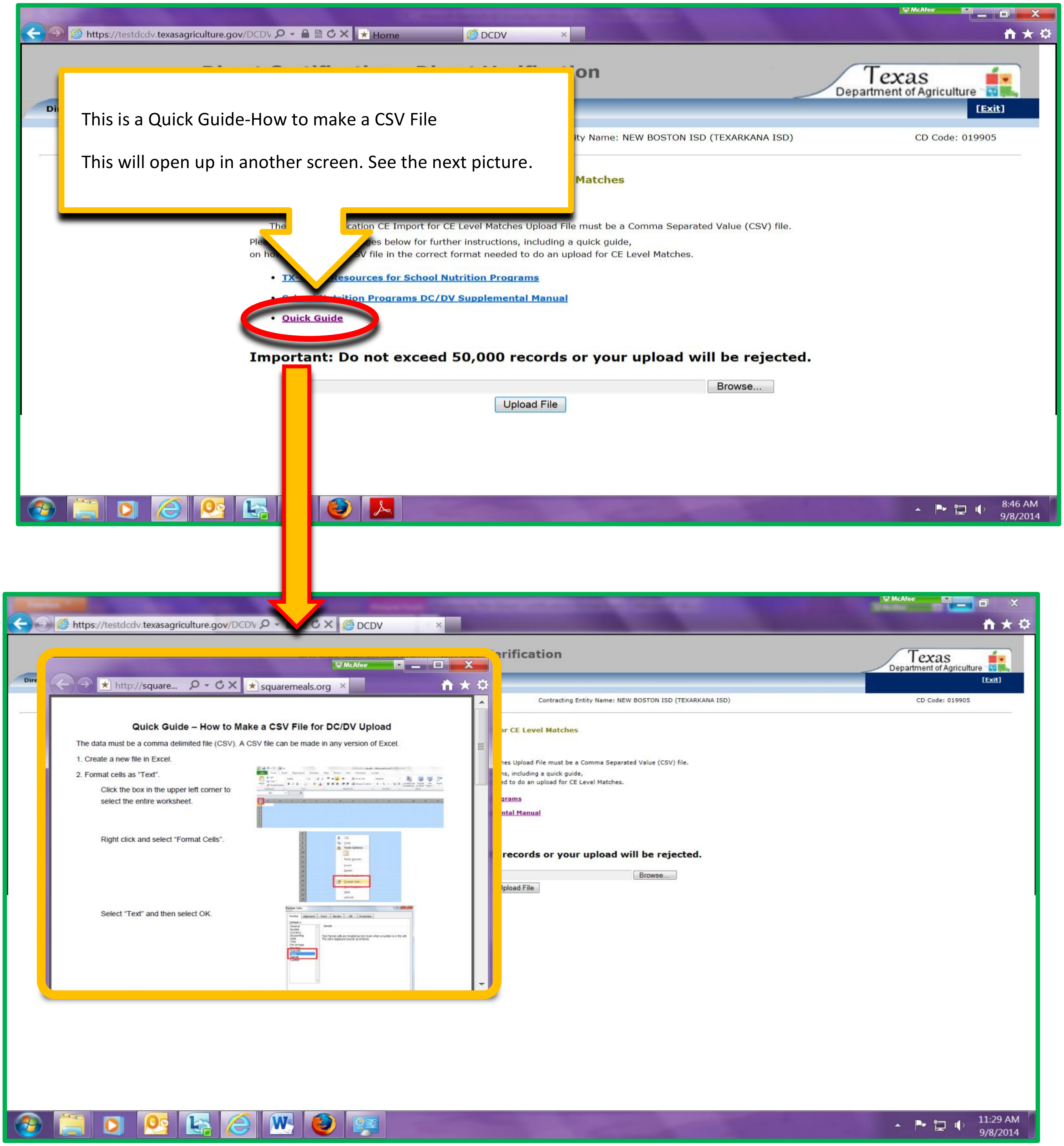
Helpful Tips

If pop-up window does not open it means you have the pop-up blocker tool on. Quick fix: Hold down your control key (Ctrl) and click on link again.




This is a complete user manual for the DC/DV process in TX-UNPS.
This will open up in another screen. See the next picture.
Direct Certification
Texas Department of Agriculture
[Exit]
CD Code: 019905
School Nutrition Programs DC/DV Supplemental Manual
Quick Guide
Important: Do not exceed 50,000 records or your upload will be rejected.
Browse...
Upload File

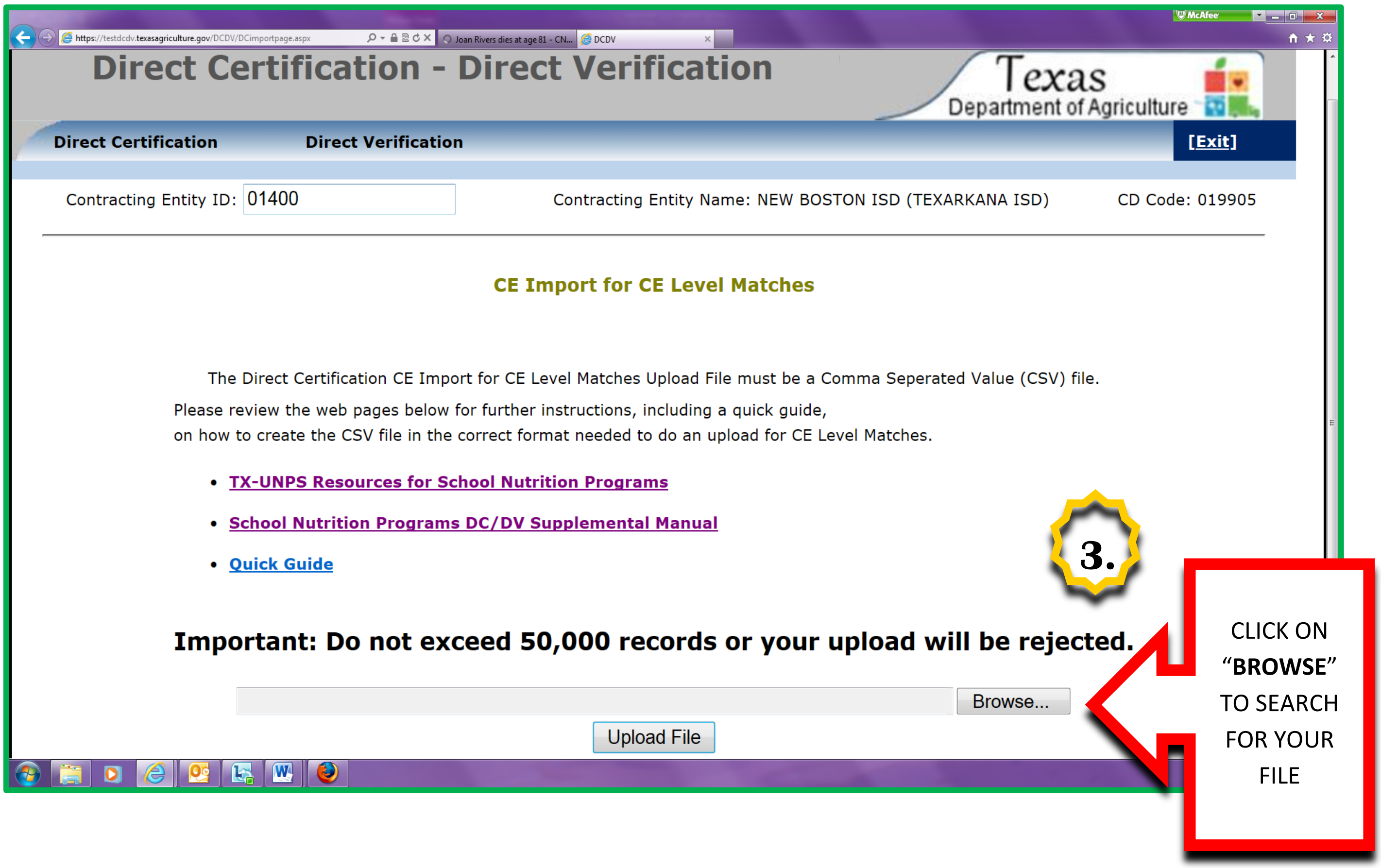

Direct Certification - Direct Verification
Texas Department of Agriculture
TEXAS DEPARTMENT OF AGRICULTURE
Texas Unified Nutrition Programs System (TX-UNPS)
School Nutrition Programs
Direct Certification and Direct Verification (DCDV)
Supplemental Manual

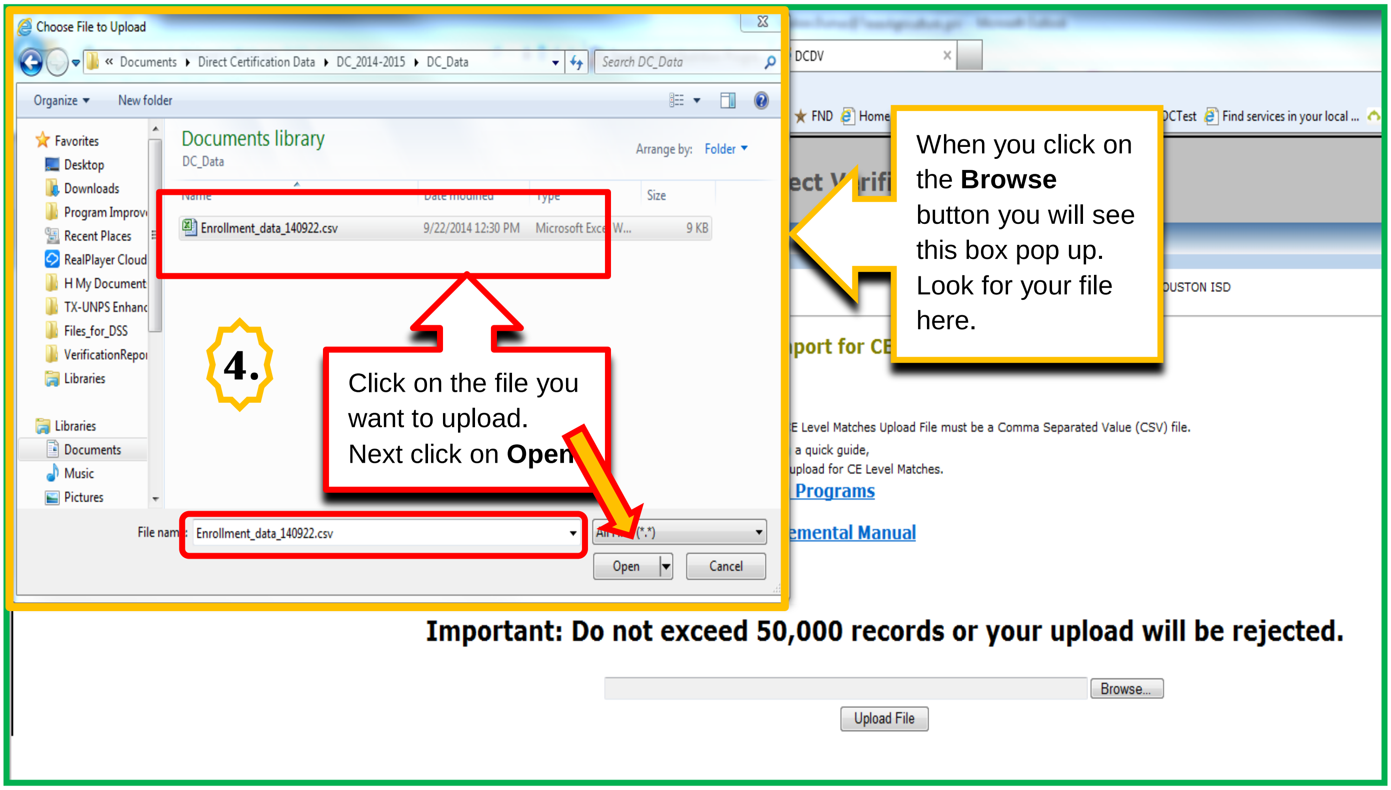

This is a Quick Guide-How to make a CSV File
This will open up in another screen. See the next picture.
Quick Guide
Important: Do not exceed 50,000 records or your upload will be rejected.
Browse...
Upload File
Quick Guide – How to Make a CSV File for DC/DV Upload
The data must be a comma delimited file (CSV). A CSV file can be made in any version of Excel.
1. Create a new file in Excel.
2. Format cells as "Text".
Click the box in the upper left corner to select the entire worksheet.
Right click and select "Format Cells".
Select "Text" and then select OK.

UPLOAD FILE



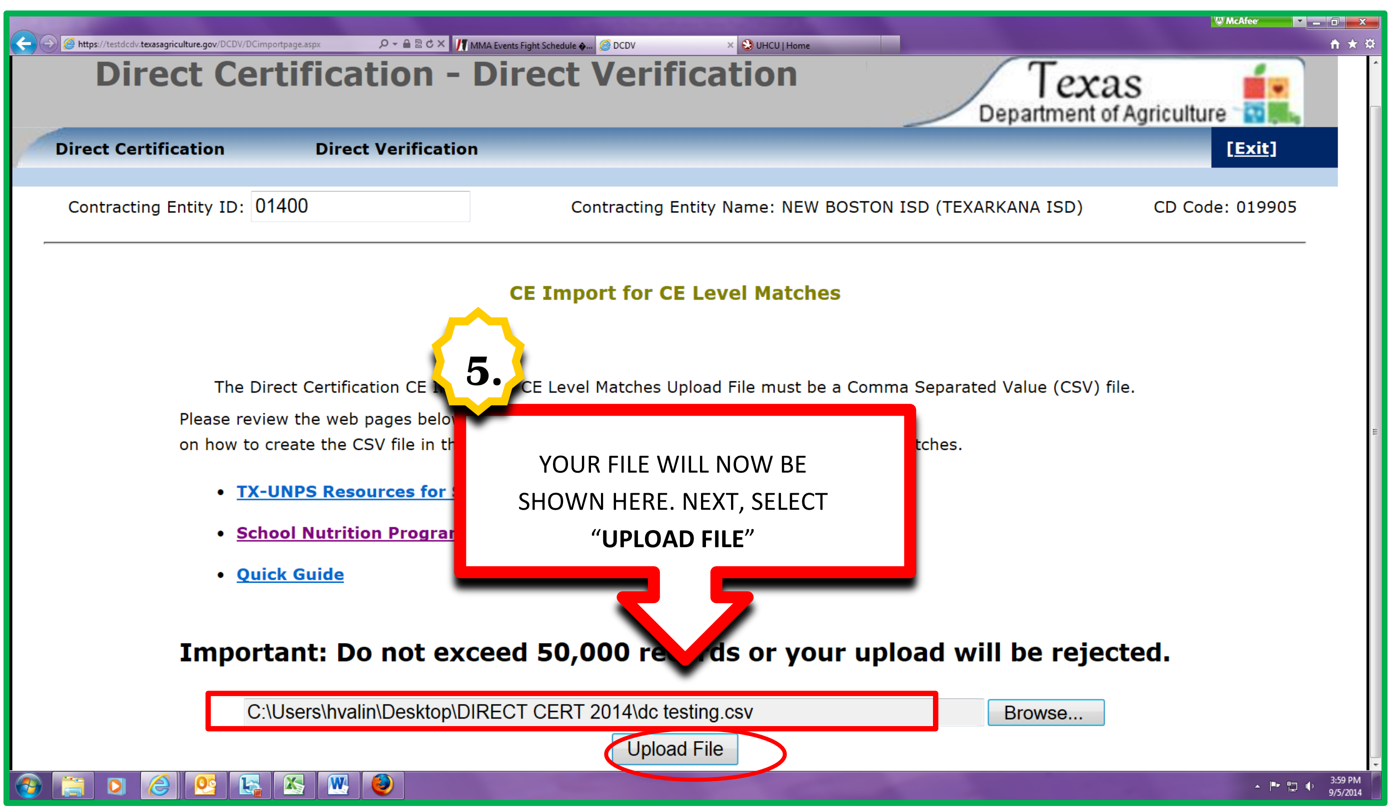
If your file contains more than 50,000 records, you will need to break it up into smaller files that have less than 50,000 records. Records of 20,000 have been successfully run in a short period of time.



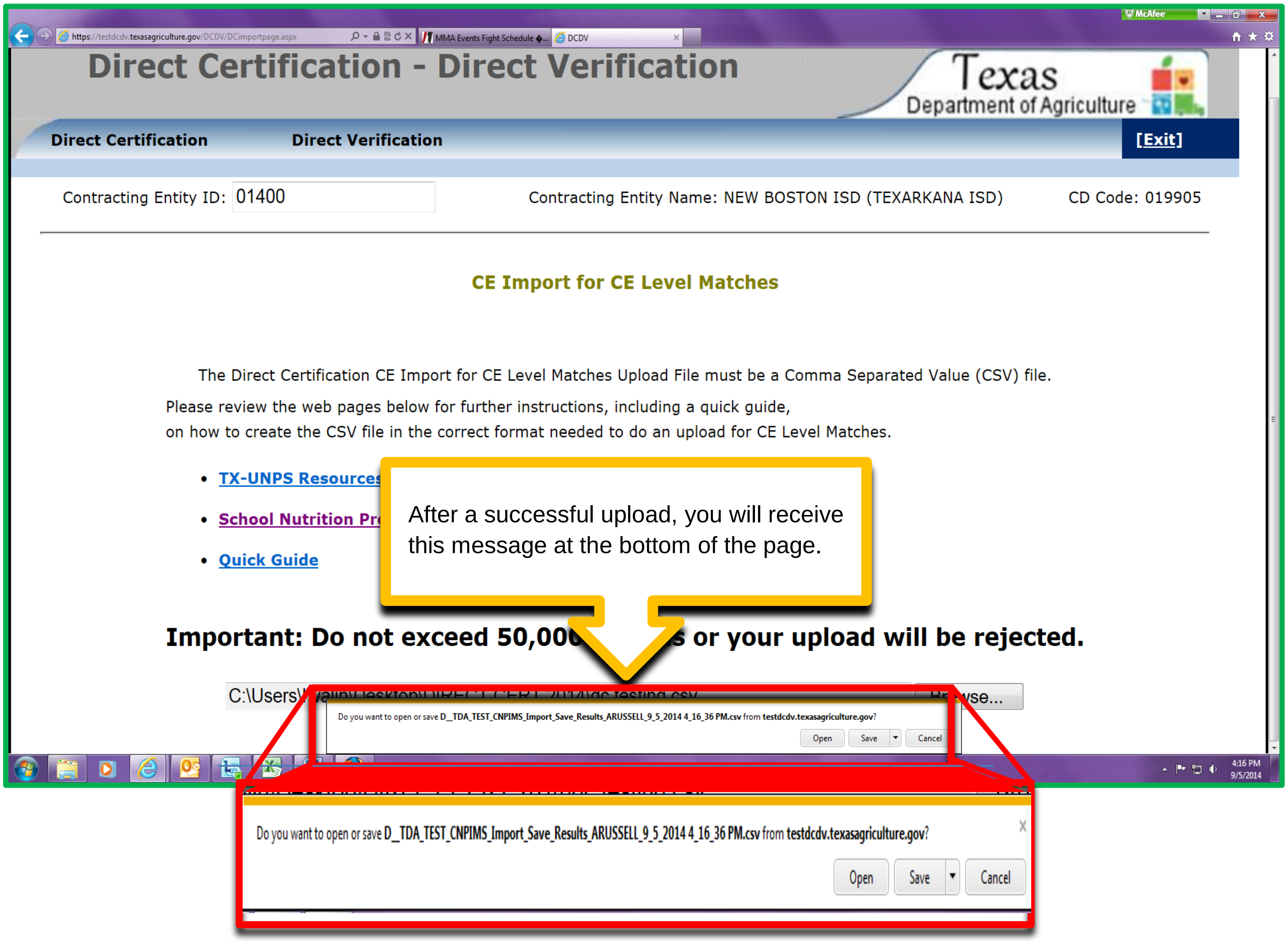




If you don't see your file (Folder) make sure you are in the right location, as we covered earlier in this manual.



SAVE THE FILE

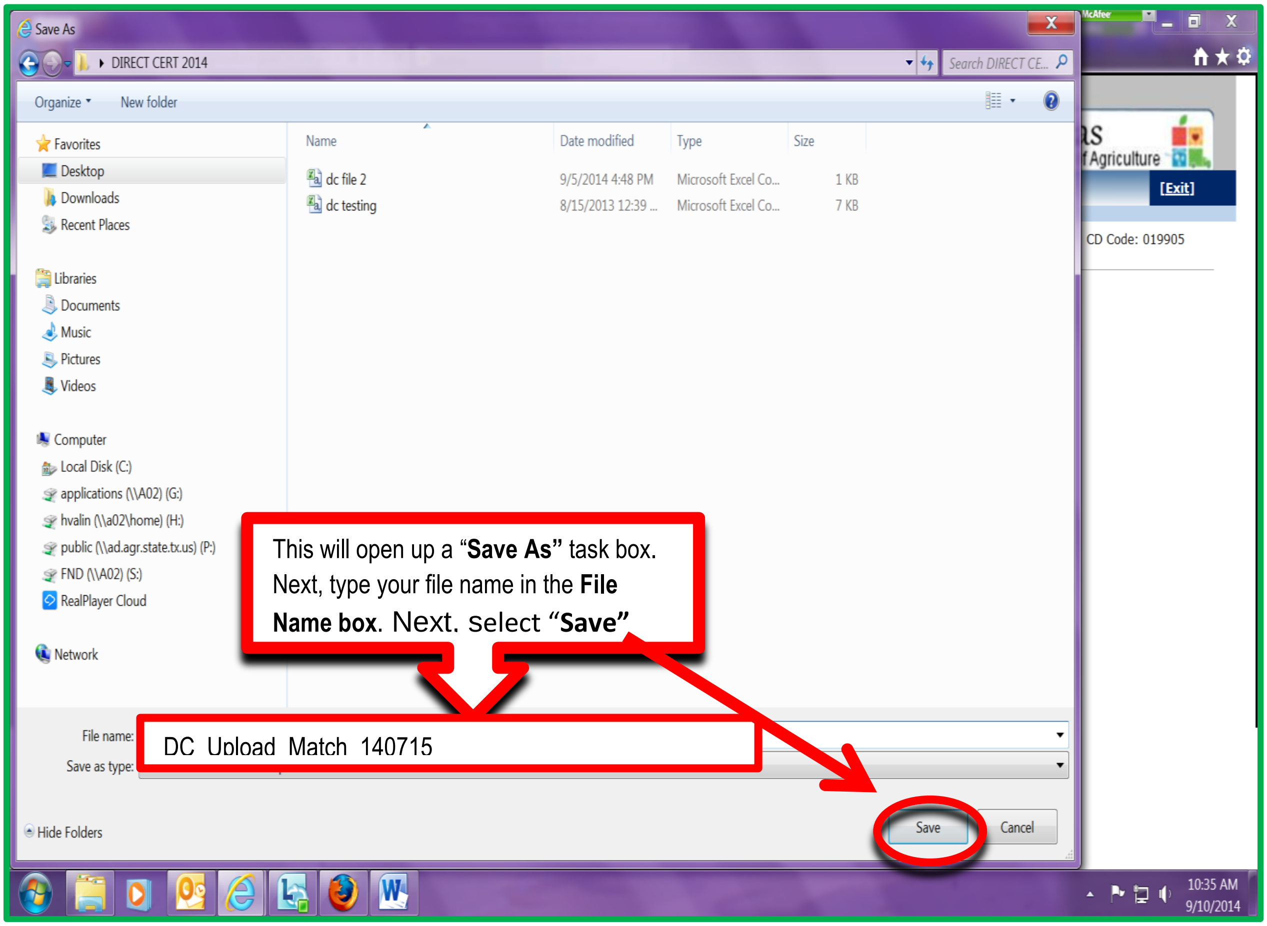


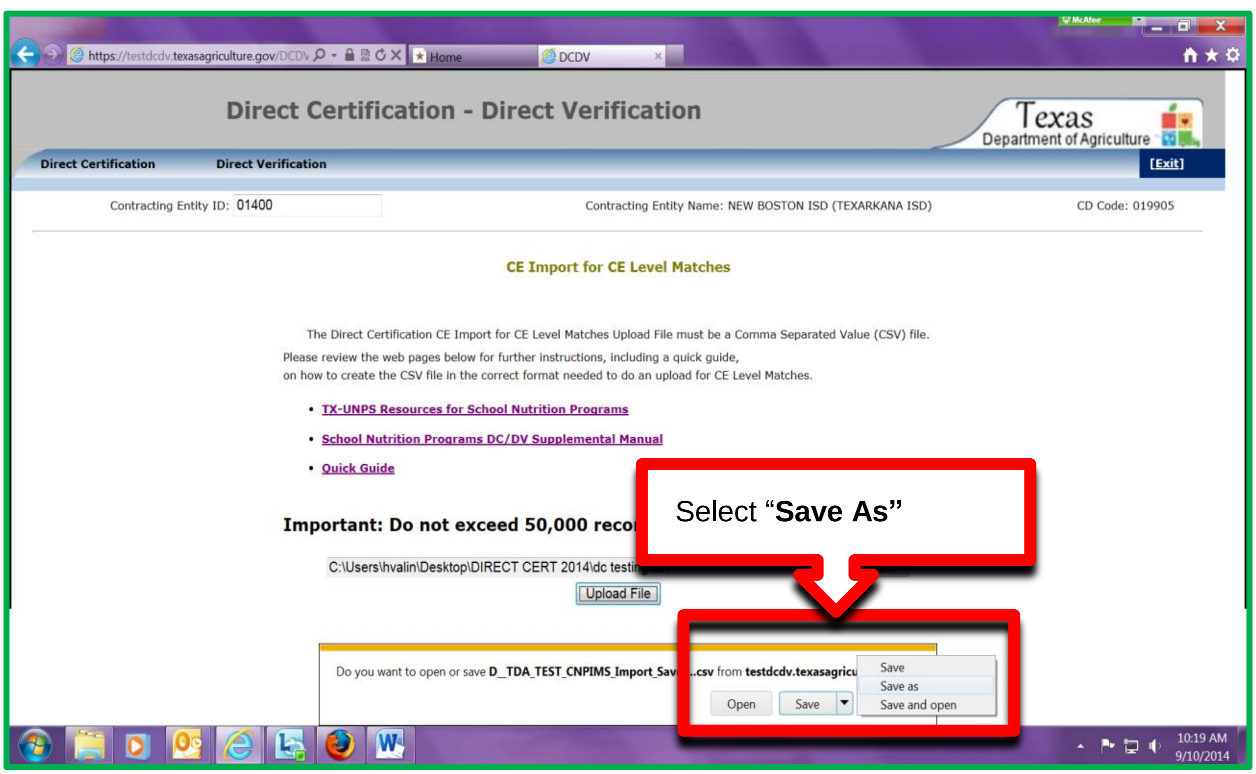


When this message appears, it is a good habit to save the file first then open it. That way you will not forget to save it. Remember to save this document to your DC folder.



When saving the file it is a good idea to use the date in the name of the file so it will be easy to find on the future. EX: DC_Upload_Match_140715 (for:July, 15, 2014)


Save As
DIRECT CERT 2014
Organize
New folder
Name
Date modified
Type
Size
dc file 2
9/5/2014 4:48 PM
Microsoft Excel Co...
1 KB
dc testing
8/15/2013 12:39 ...
Microsoft Excel Co...
7 KB
This will open up a "Save As" task box. Next, type your file name in the File Name box. Next. select "Save"
File name:
DC Upload Match 140715
Save as type:
Hide Folders
Save
Cancel


Direct Certification - Direct Verification
Direct Certification
Direct Verification
Contracting Entity ID: 01400
Contracting Entity Name: NEW BOSTON ISD (TEXARKANA ISD)
CD Code: 019905
CE Import for CE Level Matches
The Direct Certification CE Import for CE Level Matches Upload File must be a Comma Separated Value (CSV) file.
Please review the web pages below for further instructions, including a quick guide,
on how to create the CSV file in the correct format needed to do an upload for CE Level Matches.
TX-UNPS Resources for School Nutrition Programs
School Nutrition Programs DC/DV Supplemental Manual
Quick Guide
Select "Save As"
Upload File
Open
Save
Save
Save as
Save and open

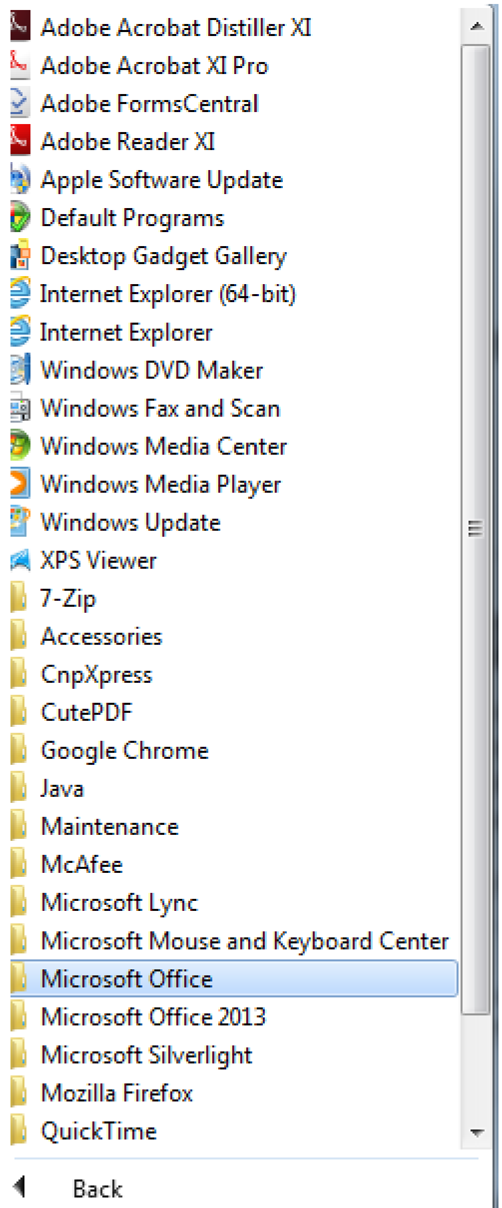
PASSWORD PROTECTING FILES

Since these files will have sensitive information (SSN, D.O.B, etc.) you need to password protect your files.

IDENTIFY EXCEL VERSION

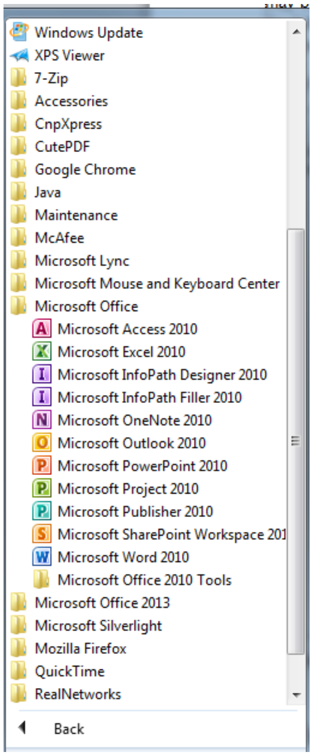
The instructions for working with Excel differ based on the version of Microsoft Office that you have. You may be able to determine what version of Microsoft Office you have by looking at the Start Menu. If not, the following information may help you determine wich set of instructions to use. Please note: The pictures are from Word, but the same steps apply to Excel.

Click on the Microsoft Gem or on the bottom left to open the Start Menu.



Double click the Microsoft Office folder. The programs listed inside of the folder will have the year of release as part of the program name. Example: Microsoft Excel 2010 is the 2010 edition.

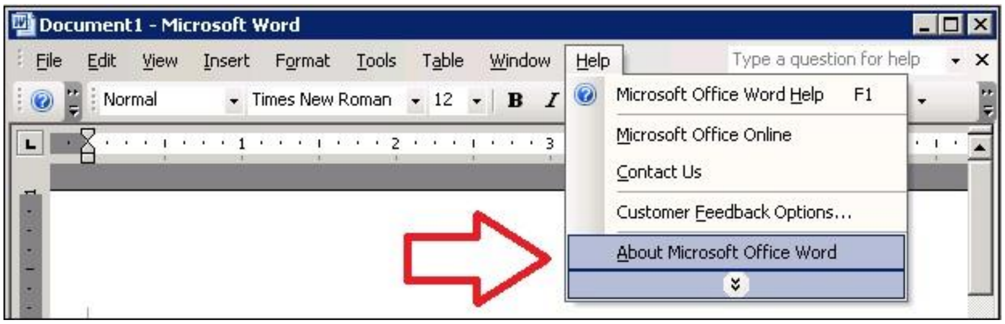
If the year is not listed as part of the program name, use the following steps.

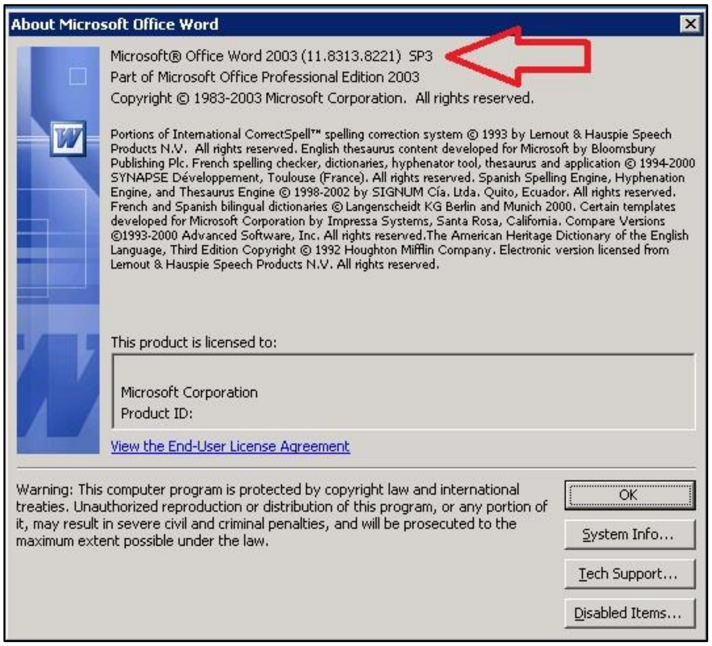


IDENTIFY EXCEL 2003 AND PASSWORD-PROTECT

Office 2003 has text-based menus on the gray bar: File, Edit, View, Insert, Format, Tools, Table, Window, and Help. (The screen shots are based on Word, but it works the same in Excel.)

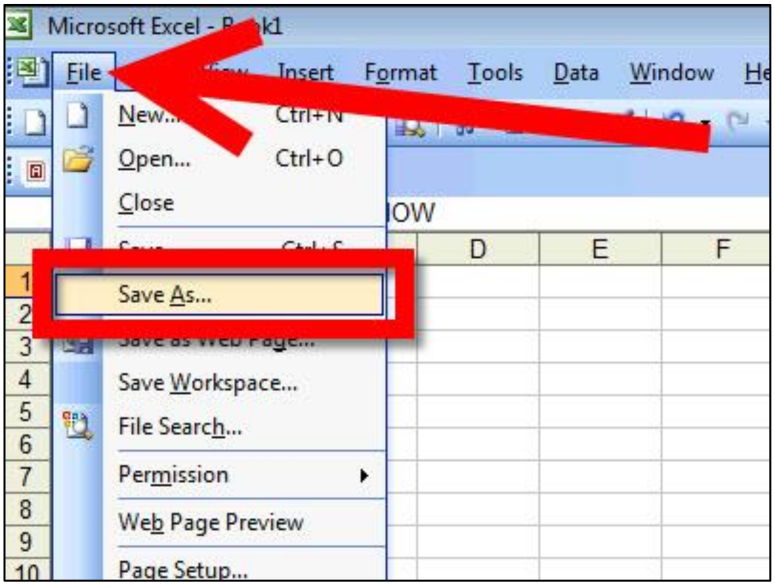
- Click **HELP** > **ABOUT**
- In the **ABOUT** Dialog box, find the version on the top line.



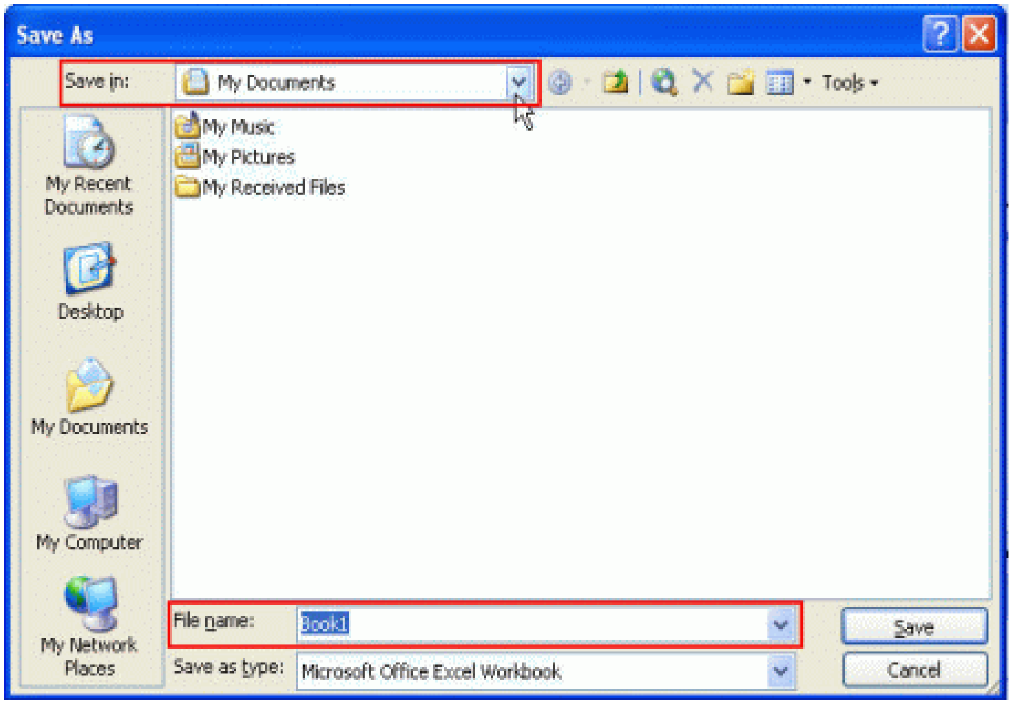


PASSWORD PROTECT IN EXCEL 2003

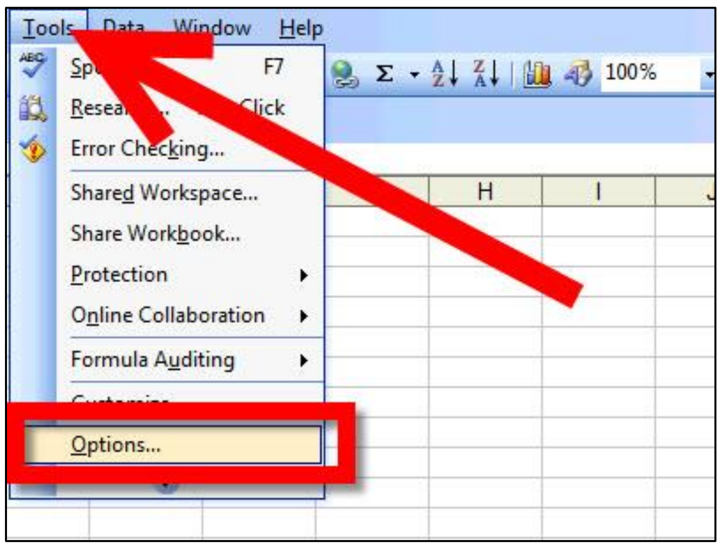
Go to the **FILE** menu and click **SAVE A**



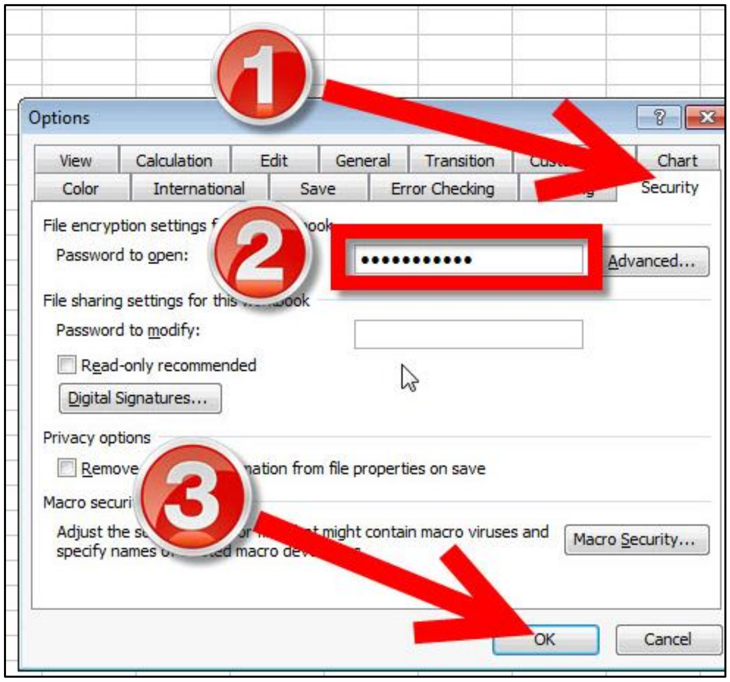
Navigate to drive and/ or folder where you plan to save the document in the **SAVE IN** box at the top. Enter the document name and click OK.



From the **TOOLS** menu, click **OPTIONS**.



On the **SECURITY** tab, type a password in the field for **PASSWORD TO OPEN**

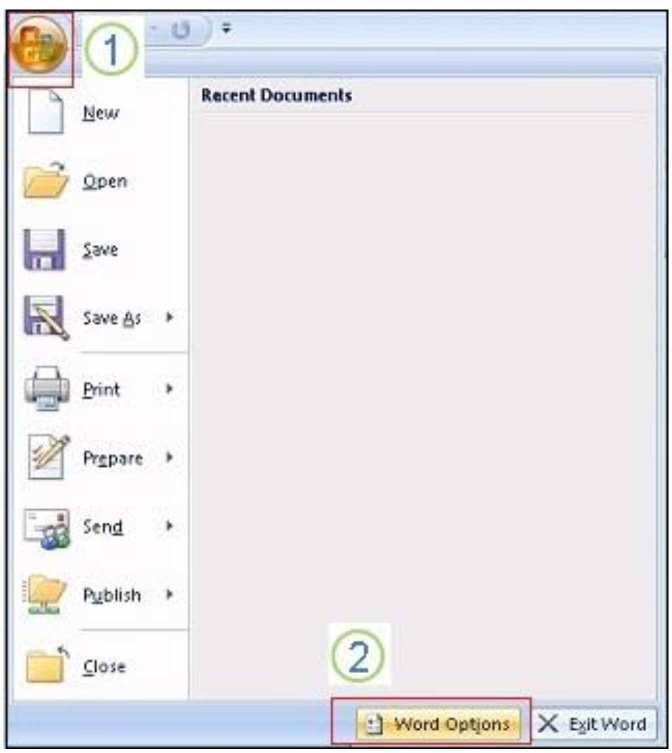


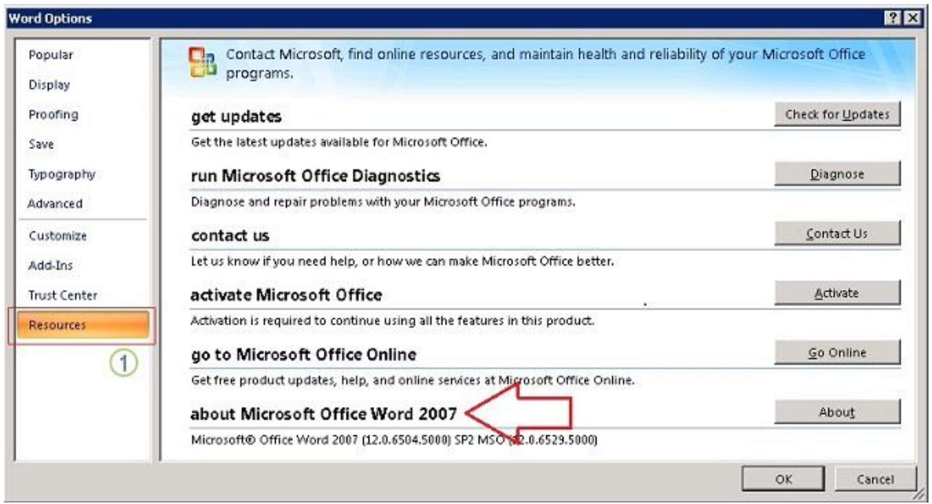
IDENTIFY OFFICE 2007 AND PASSWORD PROTECT

Office 2007 introduced tabs and the **Microsoft Office Button** and a tab menu.

- Click the **MICROSOFT OFFICE BUTTON** > **EXCEL OPTIONS**.

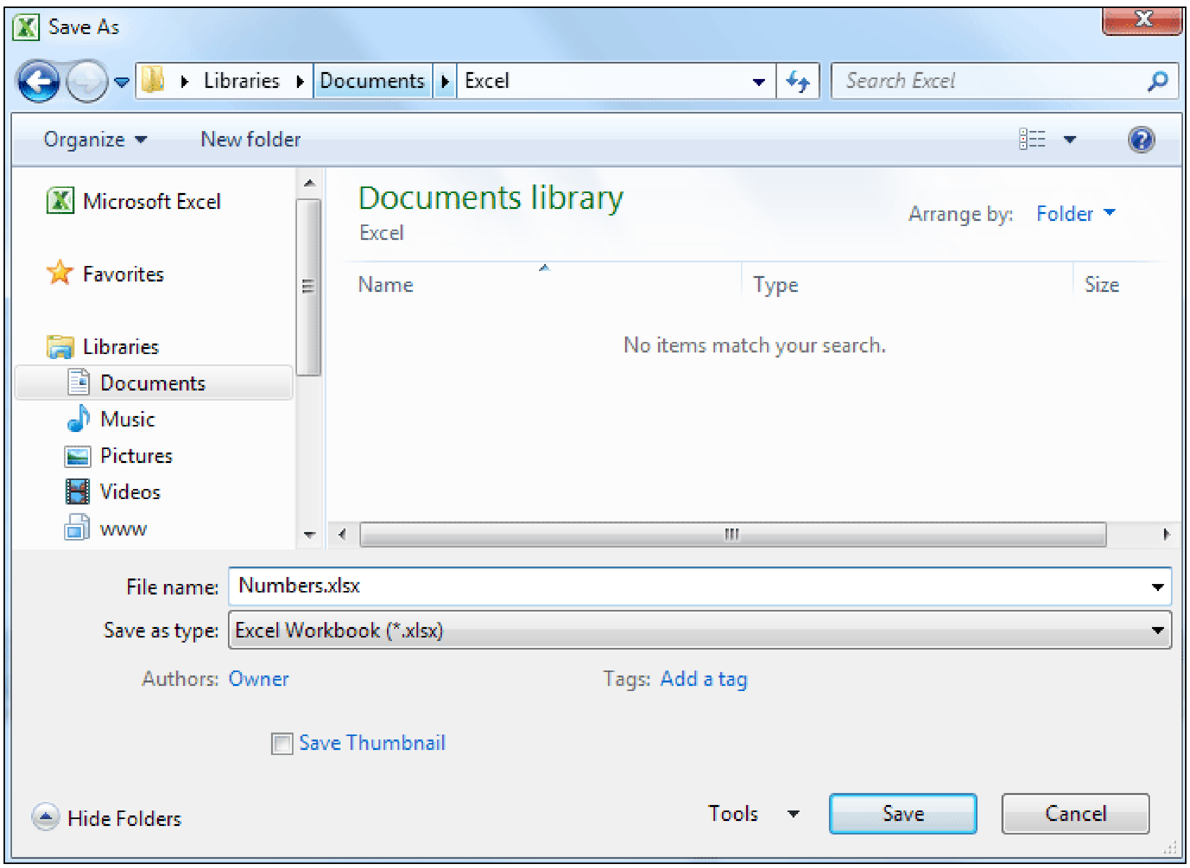
In the **OPTIONS** dialog box, click **RESOURCES**. Find the version



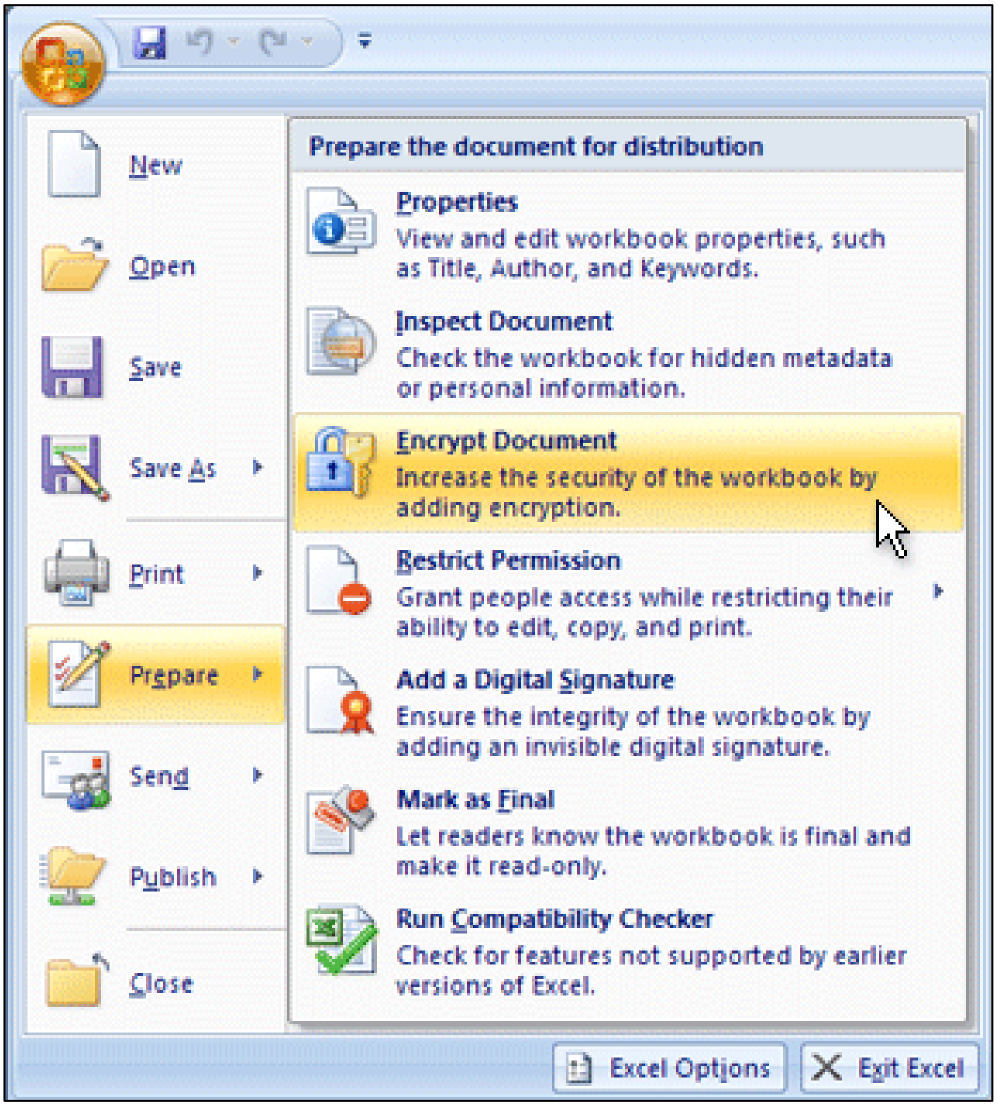


PASSWORD PROTECT IN EXCEL 2007

Click the **MICROSOFT OFFICE** Button  > **SAVE AS**. Use the down arrow in the address box (top) to navigate to where you plan to save the document. Enter the document name and click **Save.**



Click the **MICROSOFT OFFICE** button, point to **REPARE**, and then click **ENCRYPT DOCUMENT**.



In the **Password** box, type the password and click **OK**

IDENTIFY OFFICE 2010

Office 2010 introduces the **FILE** tab and the Microsoft Office Backstage view

Click **FILE** > **HELP**

Under **PRODUCT ACTIVATED**, find the version.



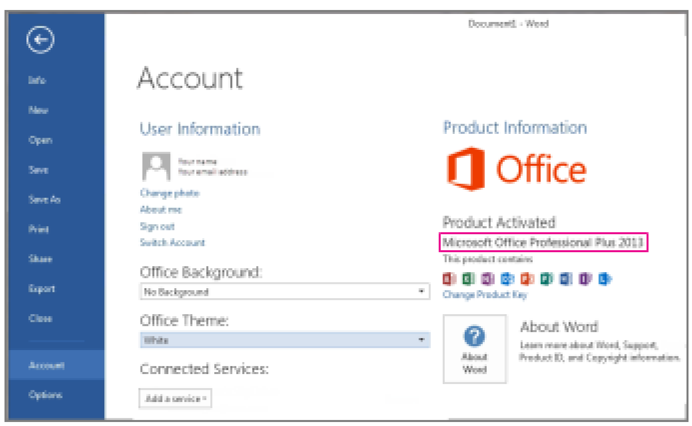
See Password Protecting instructions on page # 30

OFFICE 2013 AND OFFICE 365

The latest version of Office still uses the File tab and the Microsoft Office Backstage View.

- Click File > Account

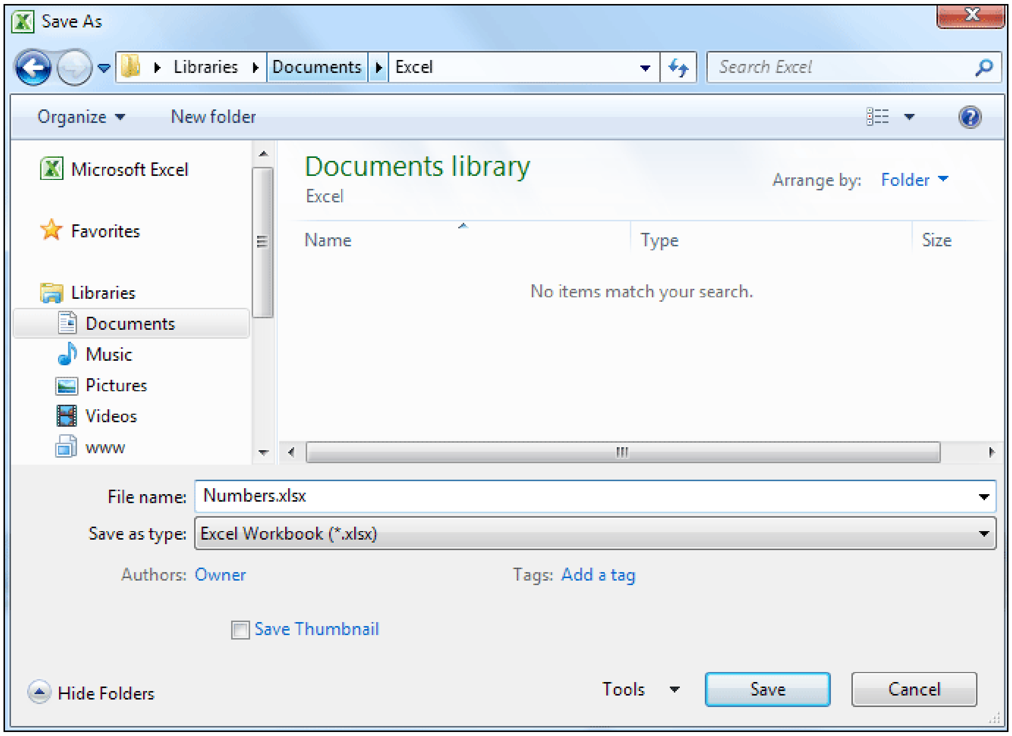
Under Product Information, find the version



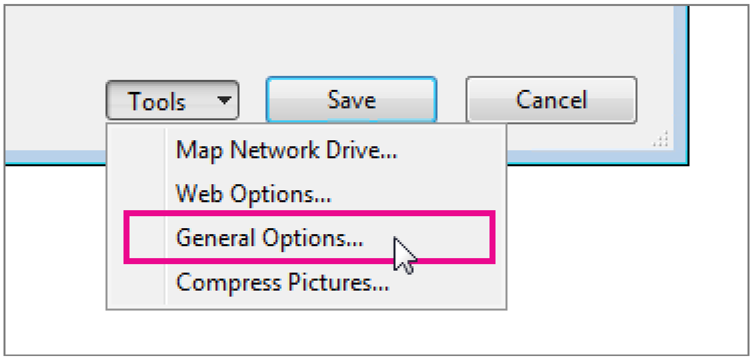
See Password Protecting instructions on page # 30

PASSWORD PROTECT IN EXCEL 2010, 2013 AND OFFICE 365

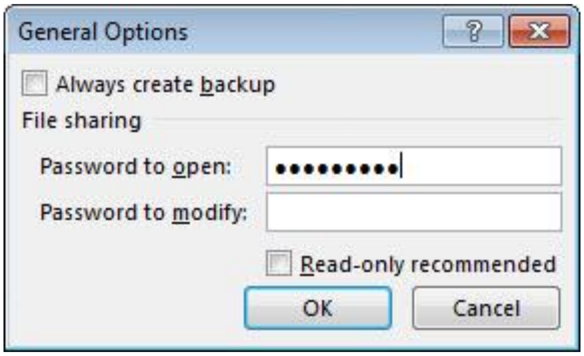
Click **FILE > SAVE AS**. Use the down arrow in the address box (top) to navigate to where you plan to save the document. Enter the document name. Do not click Save yet.



Click on **TOOLS** (bottom right) > **GENERAL OPTIONS**



In the **PASSWORD TO OPEN** box, type a password and click **OK**.



Click **Save**

You will need to remember your password. If you write it down, keep it in a secure location. A best practice is to write down a password hint rather than the actual password.

3E'S OF HEALTHY LIVING —
EDUCATION, EXERCISE AND EATING RIGHT

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Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339; or (800) 845-6136 (Spanish).

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